



Solicitation Information
April 4, 2013

RFP # 7461390

TITLE: Deferred Payment Program, Community College of Rhode Island

Submission Deadline: Wednesday May 1, 2013 @ 11:00 am (Local Prevailing Time)

Questions concerning this solicitation may be e-mailed to the Division of Purchases at questions@purchasing.ri.gov no later than **4/15/2013 12:00 noon (LPT)**. Questions should be submitted in a ***Microsoft Word attachment***. Please reference the RFP # on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

Thomas Bovis
Interdepartmental Project Manager

Vendors must register on-line at the State Purchasing Website at
www.purchasing.ri.gov

Note to Vendors:

Offers received without the entire completed four-page RIVP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

SECTION 1 - INTRODUCTION

The Rhode Island Department of Administration/Division of Purchases, on behalf of the Community College of Rhode Island, is soliciting proposals from qualified firms to provide a program to all eligible CCRI students who desire a payment plan for tuition and fees as described elsewhere herein, and in accordance with the terms of this Request for Proposals and the State's General Conditions of Purchase, which may be obtained at the Rhode Island Division of Purchases home page by Internet at <http://www.purchasing.ri.gov>

This is a Request for Proposals, not an Invitation for Bid: responses will be evaluated on the basis of the relative merits of the proposal; there will be no public opening and reading of responses received by the Office of Purchases pursuant to this Request, other than to name those offerors who have submitted proposals.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

Potential offerors are advised to review all sections of this Request carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Division of Purchases at the time of opening for any cause will be determined to be late and will not be considered.

It is intended that an award pursuant to this Request will be made to a prime contractor, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered, but subcontracts are permitted, provided that their use is clearly indicated in the offeror's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.

Offerors are advised that all materials submitted to the State for consideration in response to this Request for Proposals will be considered to be Public Records, as defined in Title 38 chapter of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request once an award has been made.

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This is a requirement only of the successful vendor.*

The offeror should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the MBE Administrator, at (401) 222-6253 .

Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.

Request for Proposal:

The Community College of Rhode Island (CCRI) needs to provide its students with alternate means of paying for their college education other than financial aid, scholarships, and/or cash or credit card payment in full on or before a designated due date for each Fall and Spring semester.

Due to limited staffing in the Bursar's Office, (CCRI), a state agency, is seeking the services of a third party deferred payment plan firm to be responsible for providing a three (3) month payment plan during each semester beginning on dates to be provided by CCRI. CCRI will determine which students are eligible for participation in this program and will submit the student list to the vendor via FTP. The selected firm will be responsible for developing the program design, coordinating the program with the designated CCRI personnel, and providing all materials to be distributed to the students. The anticipated client base for initial student contact is usually 9,000 per semester.

The program needs to be in place by 6/1/2013 for the Fall 2013 semester and continue through 5/31/2014 for the Spring 2014 semester, renewable on an annual basis through 5/31/2016. Termination may be affected by the State based upon factors such as unsatisfactory performance. The College also reserves the right to termination of the program if the need for the program no longer exists, the scope of the services needs to be revised, or the College itself has the ability to administer its own program.

Only proposals which meet certain requirements will be considered. In summary, the bidder must describe the nature of monthly statements (use of coupon books not acceptable), customer service capabilities, effective communication methods with the College and with students, FTP capabilities, and formal and ad hoc reporting capabilities.

To meet these requirements, the bidder must

- provide a current listing of client references indicating other institutions of higher education currently being served,
- provide proof of bonding showing limits,
- provide a complete breakdown of all fees, interest, or other charges which would be incurred by either CCRI or the students who opt to enroll in the payment program,
- provide evidence of affiliation with a professional association,
- provide, but not limited to, a detailed description of the enrollment process, financial planning and counseling provided to students/parents, the structure of the program, detailed procedures for making changes in installment contracts by participants including notification to CCRI, and student default procedures,
- provide a description of any support services or any other assistance to be provided to CCRI,
- provide a description of how student accounts will be handled through the initial enrollment process through to the last installment payment,
- provide assurance of ease of implementation of the installment plan with CCRI's BANNER system, the College's fully integrated database administrative system,
- provide samples of all letters, billings and other correspondence utilized in the payment plan process.

Background:

The Community College is a comprehensive community college offering an array of associate degree and certificate programs and non-credit personal and professional development courses and programs. Students may enroll in classes at any of the four main campuses or at satellite facilities across the state. For more information about CCRI visit www.ccri.edu.

Scope of Project:

The selected firm must

- separate Fall and Spring semester payment plans based on start and end dates provided by CCRI for the beginning and end dates of the three (3) payment plan,
- provide students with monthly billings of which a coupon book option is not acceptable,
- forward to CCRI all funds collected on not less than a monthly basis through a direct wire transfer,

- Receive payments directly from students by phone, online, and mail. Payments must be posted to student's Banner account immediately as received. Overnight lockbox systems or third party subcontractors are not acceptable ,
- provide a detail plan of any assistance to be provided for collecting past due accounts,
- be able to transmit and receive data through FTP that meets CCRI's specifications. Student account information must be updated in CCRI's Banner system every 5 minutes at minimum,
- provide a direct contact person from the firm's home office or other designated site,
- be solely responsible for all mailing costs and other costs that relate to the tuition payment plan,
- have web access capabilities as well as direct person access capabilities during normal business hours to assist CCRI staff via telephone or fax as needed,
- provide a toll free number at least 10 hours per day M-F and at least 5 hours on Saturdays for students to call in order to receive answers to questions about the plan in general and/or questions about their accounts. Must be staffed with live knowledgeable persons not an automated voice system.
- provide various summary and detail reports including student account contract change reports and delinquency reports to the College upon request,
- provide all letters, billings and other correspondence necessary to carryout the deferred payment program giving CCRI the right of approval for all such communications,
- provide on-site assistance at the various Bursar locations during peak registration periods at all four campuses, the dates to be determined by CCRI,
- have the ability to allow students to enroll in the program not only through the mail but also in-person, online and by telephone during specified enrollment periods determined by CCRI,
- provide flexibility in modifying student account balances,
- provide ability to accept late enrollments.

PROPOSAL/QUESTIONS & SUBMISSION

Questions concerning this solicitation may be e-mailed to the Division of Purchases at questions@purchasing.ri.gov no later than the date listed on the cover sheet. **Send questions in a Microsoft Word format.** Please reference the RFP # on all correspondence. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. For computer technical assistance, call the Help Desk at 401 222-2142, ext 134

Interested offerors may submit proposals to provide the services covered by this Request on or before the date listed on the cover sheet. Proposals received after this time and date will not be considered.

Proposals must include the following:

1. A completed and signed four page R.I.V.I.P. generated bidder certification cover form (downloaded from the R.I. Division of Purchases Internet home page at: <http://www.purchasing.ri.gov>);
2. A signed and **separately sealed Cost Proposal** reflecting the all fee proposed for this scope of service.
3. A completed and signed W-9 taxpayer certification form. *The form is downloadable at www.purchasing.ri.gov. Should only be included in proposal marked "Original".*
4. A proposal describing the background, qualification, and experience with and for similar programs, as well as the work plan or approach proposed for this requirement.

The proposal must contain the following sections:

- a. Executive Summary
The Executive Summary is intended to highlight the contents of the proposal and to provide State evaluators with a broad understanding of the offeror's approach and ability.
- b. Offeror's Organization and Staffing

This section shall include identification of all staff and/or subcontractors proposed as members of the project team, and the duties, responsibilities, and concentration of effort which apply to each (as well as resumes, curricula vitae, or statements of prior experience and qualification) and the offerors experience in providing student installment plans to other institutions of higher education, preferably community colleges. The offeror must assure that all personnel assigned to perform under any resultant contract shall be capable and qualified in the work assigned to them.
- c. Work Plan/Approach Proposed

This section shall contain a thorough explanation of all the aspects and services required to complete the Scope of Work section. This will include a demonstration of the knowledge and ability to coordinate services with appropriate personnel of the College. (Letters of agreement, affiliation or

support describing relationship and extent of coordination should be appended.)

This section shall describe the offeror's understanding of the State's requirement, including the result(s) intended and desired, the approach and/or methodology to be employed, and a work plan for accomplishing the results proposed. The description of approach shall discuss and justify the approach proposed to be taken for each task, and the technical issues that will or may be confronted at each stage on the project. The work plan description shall include a detailed time line, a list of tasks, activities, and/or milestones that need to be employed by the offeror and/or the College in order to administer the three (3) payment plan for its students for the Fall and Spring semesters.

- d. Previous Experience and Background, including the following information:
 - 1) A comprehensive listing of similar projects undertaken at other institutions of higher education preferably community colleges including a brief description of the projects.
 - 2) A description of the business background of the offeror (and all subcontractors proposed), including a description of their financial position.
- e. The offeror's status as a Minority Business Enterprise (MBE), certified by the Rhode Island Department of Administration, and or a subcontracting plan which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurement. Questions concerning this requirement should be addressed to the, M.B.E. Officer, at (401) 222-6253.

Proposals - an original plus five (5) copies of the Technical component and an original plus 2 copies of the Cost component should be mailed or hand-delivered in a sealed envelope, marked with the RFP name and number listed on the cover sheet, to:

**RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855**

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals emailed or faxed to the Division of Purchases will not be considered. The official time clock is located in the Reception Area of the Division of Purchases

Evaluation Criteria:

Each category below will be rated from 1-5, with 5 being the highest score and 1 being the lowest score. A maximum score would be 115 points.

Requirements

1. Confirmation of insurance including coverage and dollar limit coverage.
2. Current listing of client references in higher education, preferably community colleges.
3. Proof of bonding showing limits.
4. Written narrative including experience with installment plans in general terms as well as the expertise of staff to be assigned to the contract.
5. Resumes of all staff committed to the contract.
6. Evidence of affiliation with a professional organization.
7. Confirmation of the ability to provide a three (3) payment plan both for the Fall semester and the Spring semester with start and end dates for each plan controlled by CCRI.
8. Detailed description of enrollment process, financial planning counseling for students/parents, procedures for making changes to an installment plan, and student default procedures.
9. Detailed description of a monthly student billing process with the assurance that a coupon book will not be distributed to the student.
10. Detailed description of the manner in which and how often funds would be transmitted to CCRI for processing against student accounts.
11. Confirmation of ability to transmit funds to CCRI via wire transfer.
12. Confirmation of ability to transmit information between CCRI and the offeror using FTP.
13. Detailed plan to contact students about delinquent payments.
14. Nature of support services provided to CCRI specifically access to a toll-free number, a fax number or internet site for both students and CCRI staff during normal business hours as well as on-site staff support during peak registration times.
15. Sole responsibility for all mailing costs and other related costs that pertain to the plan.
16. Complete listing of various reports provided by the offeror.
17. Confirmation of the ability to provide ad hoc reporting.
18. Samples of all letters, billings and other correspondence which CCRI reserves the right to approve.
19. Assurance of ease in implementation in conjunction with CCRI management information system, BANNER.
20. Ability to accept late enrollments.
21. Ability to allow students to enroll in the program not only through the mail but also in-person during specified enrollment periods determined by CCRI.
22. Description of any other assistance that the offeror will provide to CCRI.
23. Complete breakdown of all fees, interest, or other charges which would be incurred by CCRI or the participating students. **In a separate sealed envelope.**

Notwithstanding the above, the State reserves the right to award on the basis of cost alone, to accept or reject any, or all, options, bids, proposals, and to act in its best interest.

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentation(s) by offeror's clearly in consideration for award.

The Technical Review Sub-Committee will present written findings, including the results of all evaluations, to the State's Purchasing Agent who will make the final selection for this requirement.

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